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OPPORTUNITIES TO RESPONSIBLE LAND-BASED INVESTMENTS IN CENTRAL AFRICA

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ABSTRACT

Large-scale land-based investments in Central Africa are not new, however, the years 2000s have seen a renewed interest in agriculture by foreign investors. This new rush for farm land involved multi-national holdings new in the region and sometimes in the sector. With a focus on five countries of the region hosting the majority of the Congo Basin natural forests: Cameroon, Gabon, Democratic Republic of Congo (DRC), and Republic of Congo (Congo), Central African Republic (CAR), this paper looks at this recent wave of investments in farm lands, and discusses their specificities, the ways the host countries deal with investors, and the impacts on livelihoods and on forest cover that these large-scale projects might have. The analysis draws on scientific literature and media reports review, an assessment of large scale land acquisitions for agricultural expansion, logging, conservation, or mining projects, and field surveys conducted in 2012 and 2013 in Cameroon, Gabon and Republic of Congo where key stakeholders have been interviewed (representatives of the various ministries involved in large-scale land deals, managers from the private sector presently investing in land-based projects, NGOs, land and tenure experts, villagers nearby on-going land-based projects).

KEY WORDS

Agro-industries, deforestation, land grabbing, Cameroon, Gabon, Republic of Congo (Congo).

INTRODUCTION

Central African rainforests represent the second largest rainforests after the Amazon (Mayaux *et al.* 1998), and harbor a rich biodiversity. They have been relatively well preserved up to recent times due to low demographic pressure, limited accessibility, poor infrastructure, low impact logging and rural exodus (Burgess et al. 2006; Megevand *et al*. 2013). Nonetheless, deforestation in the Central African region has increased in recent years, with a deforestation rate of 0.13% between 1990 and 2000 which doubled to 0.26% between 2000 and 2005 (Ernst *et al.* 2012).

The rush for farmland (including for agro-industrial plantations of oil palm and rubber) and non-renewable natural resources such as metals or fossil fuels (oil, iron ore and coal) drives a flow of foreign investments to the region, where concessions have been negotiated by the national governments at an increasing speed in recent years (Deininger *et al.* 2011; Ochieng Odhiambo 2011; Hoyle and Levang 2012; Karsenty and Ongolo 2012). As a consequence, huge areas of forests are at threat, as well as local people's access to land (Cotula *et al*. 2009; de Wasseige *et al.* 2012). Developed and emergent countries increasingly search for resources abroad to fulfill the consumption needs of their populations. Consumers no longer rely only on the resources available within national territories but increasingly seek resources abroad. Multi-national and trans-national enterprises come to Central Africa looking for land to develop agro-industrial plantations for food, feed or biofuel, and for mineral resources hidden under the forest. There has been a huge increase not only in the number of prospecting and development projects, but also in land deals based on speculation over the increasing price of land (Deininger *et al.* 2011; Anseeuw *et al.* 2012).

In Central African countries, agro-industrial plantations and mining are key sectors in the national long-term strategies for economic growth and employment while forestry and environmental issues are of declining importance to contemporary development policy agendas (Megevand *et al.* 2013). The potential economic benefits of agro-industrial and mining projects are huge, with promises of infrastructure development, direct compensations for surrounding communities, tax revenue and employment which seduce not only decision makers, but also local populations (Feintrenie *et al.* 2010; Feintrenie and Levang 2011, Ochieng Odhiambo 2011). Mineral prospecting in Central Africa has already brought to light some of the largest reserves of iron, cobalt, nickel, chrome, as well as gold and diamonds: up to 85% platinum, 60% cobalt, and 75% diamonds of the world's reserves according to Mercer *et al.* (2011, p 242). These reserves have been poorly exploited up to now: African production represents less than 8% of the world market in 2012 (Ncube 2012), but an increase in the production is predicted in response to the world demand in metals and precious stones.

In addition to these production sectors, large areas of forests are set aside for conservation, reducing land accessible by local producers. The increasing demand on natural resources also leads to competition for land among very different actors ranging from indigenous farmers to multi-national enterprises. As a consequence conflicts over land are on the increase, especially where plantation or mining exploration permits overlap with customary lands, logging concessions on permanent forests, or protected areas (Cotula *et al*. 2009; Ncube 2012).

METHOD

The paper will examine the emergent pressures on land in five countries of the Central African Forests Commission (COMIFAC) hosting the majority of the Congo basin forests area (more than 95%, de Wasseige et al. 2012): Cameroon, Gabon, Democratic Republic of Congo (DRC), Republic of Congo and Central African Republic (CAR).

The analysis draws on scientific literature and media reports review, an assessment of large scale land acquisitions for agricultural expansion, logging, conservation, or mining projects (including data from the Land Matrix project, see ILC 2012), and field surveys conducted by the author in 2012 and 2013 in Cameroon, Gabon and Republic of Congo, where key stakeholders have been interviewed (representatives of the various ministries involved in large-scale land deals, managers of the private sector presently investing in land-based projects, NGOs, land and tenure experts, villagers nearby on-going land-based projects).

LARGE-SCALE LAND ACQUISITIONS IN CENTRAL AFRICA, A LONG STORY

History of large-scale land-based productions

Large-scale investments in land are not new to Central Africa. There has been over time several periods of important investments, beginning with the development of large-scale agro-industrial plantations or crops (rubber, sugar cane, cotton…) during colonial times, followed by nationalizations during the post-colonial period after independencies, and privatization in the 1980s and 1990s.

During the colonial period, North-South commercial flows settled, mainly composed of raw material extracted or produced in the colonies to be transformed in the North, and added value manufactured products produced in the North and exported to the South. Extractivism has been a strong practice of colonial powers, and strongly shaped the global economy, most of commercial flows involving least developed countries still follow this South-North direction (Giljum and Eisenmenger 2004). New independent countries had long continued to feed this market, and tried to make use of the industrial plantations left behind by former authorities.
The development of exportation from Southern poorer to Northern richer countries was supposed to end in an equitable global market according to the ricardian theory of regional comparative advantages (Ricardo, 1821). Public interventions and management were pointed as main causes of the poor economic development of Southern countries, neo-liberalists promoted disengagement of the states and opening of market barriers under IMF re-adjustment plans in the 1990s, promising fast development. But political instability, conflicts, lack of a stable and clean business climate, and extensive costs of infrastructure development, have restrained investments for long. Strong disparities in the conditions of agricultural production and access to subsidies between North American and European farmers and African ones have also created an unfair competition on the food market, and not helped develop the agricultural sector in Africa. But things are changing, since 2000, new flows of investments come to and go from Africa, not involving Northern countries but Southern emergent countries. Malaysian, Indian, Chinese, Brazilian, South-African investors are now exploring Central Africa and investing in land and industrial projects in the region.

The history of the Republic of Congo is representative of the 4 waves of large-scale land investments in agriculture:

1. From 1891 to 1960, the country was a French colony. Some agricultural plantations were developed by private enterprises: sugar cane, oil palm, rubber. The concessionary regime was instituted in the forestry sector, and industrial forestry plantations were tested on savannahs around Pointe-Noire.
2. The country gets its independency on August 15th 1960. In the 1970s, oil palm plantations were nationalized; all agricultural productions were organized through public marketing offices in charge of the provision of technical support to family farmers, and of the collection and commercialization of the products, with a minimum price fixed by the Ministry. The State tried to develop cash crops such as oil palm, coffee and cocoa, Eucalyptus plantations were developed in the early 1980s. But neglected public plantations were abandoned in the mid-1980s.
3. In 1990, the agricultural public offices were dismantled and public plantations were made open to privatization. However no investor came for the old oil palm plantations whereas successive private investors managed the Eucalyptus plantations of the South. The private sector wasn't ready to take over the commercialization of agricultural commodities (especially coffee and cocoa), and the whole agricultural sector entered an economic crisis. Since then agriculture has been almost limited to family staple food production, with few sells, even to the domestic market.
4. After a decade of political and economic crisis, there are nearly no export in the agricultural sector, with the exception of sugar cane produced by Saris (on a land acquired during colonial times). The State launched public development programs targeting rural areas. Infrastructures are being developed and the investors are awaited to galvanize the agricultural sector. A national program of afforestation and reforestation (ProNAR) has been launched in 2011 and aims at the plantation of 1 Million ha before 2021. Within this program, a Malaysian enterprise (Atama) acquired a large concession to plant oil palm in the northern part of the country, a French one developed a new plantation of Eucalyptus.

Figure 1 shows the historical evolution of large-scale land acquisitions since 1960. The estimation before 1980 is still to be completed, as the plantations or large-scale crops that have been abandoned are not included in this estimation, only concessions presently attributed are considered here.

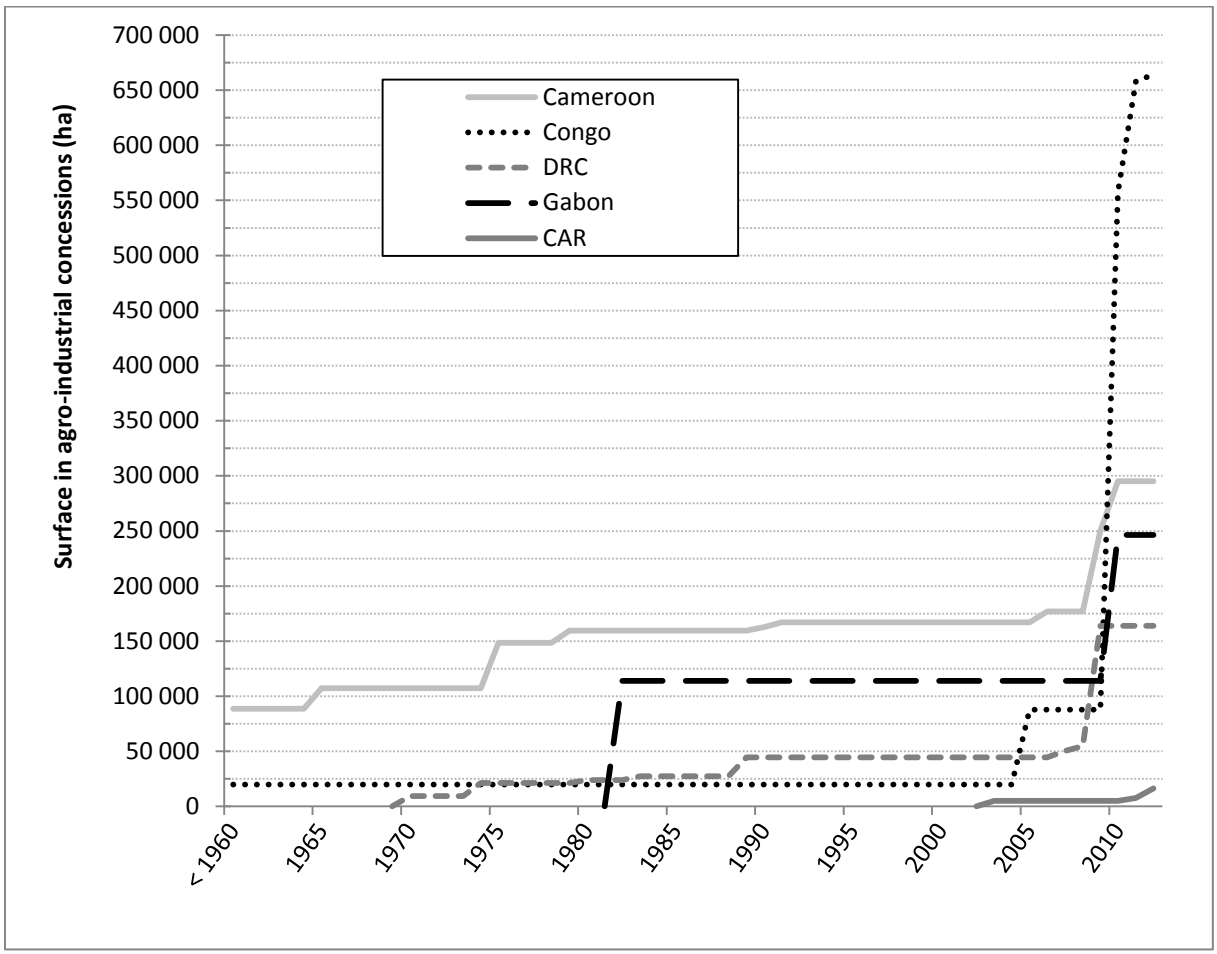

Figure 1: Historical evolution of the surface under agro-industrial concessions in five countries of Central Africa until 2012

Land acquisitions of before 1960 were created during colonial times, and are still exploited today, but most often by a different owner (or concession manager, depending on the status of the land) than the first owner or concession manager. As an exception, the enterprise SARIS is the only agro-industrial actor with a long-term history of production in Congo. In 1940, the French family Vilgrain bought 20 000 ha of land in the territory of Nkayi, and created the "Société Industrielle et Agricole du Niari" (Industrial and agricultural society of Niari). Productions of peanut oil, sugar cane, and flour were developed, with installations of mills and plantations (but importation of corn to produce flour). In the 1970s, the agro-industrial complex was nationalized. When the production complex was later privatized in 1991, only the sugar cane production was still running. The industry went back to the Vilgrain family, under the name 'Société Agricole et de Raffinage Industriel du Sucre' (SARIS, Agricultural and Industrial Refinery Society of sugar), whose financial capital belongs for 66% to SOMDIAA, a filial of the group Vilgrain et

Castel, and 34% belong to the Congolese state. SOMDIAA also owns similar sugar cane production complexes in Cameroon, Gabon, CAR, Tchad, and Ivory Coast.

Figure 1 shows few new large-scale land acquisitions from 1960 to 2000. Besides, land acquisitions since 2000 are of a larger scale than ever before, rushing up to 600 000 ha for one concession to develop 180 000 ha of plantation attributed to the Atama company in Congo, or Olam in Gabon that planned to plant 200 000 ha of oil palm and rubber in joint-ventures with the state, on 300 000 ha of concessions.

The forestry sector has also known several waves of management. Large forest concessions have been allocated to private enterprises by the colonial powers, at the independencies changes of land ownership came, with on occasion changes of the managing logging companies. About 44 Million ha of forest are presently under logging concessions (De Wasseige et al. 2012): 74% of lowland dense forest area in Congo is under logging concessions, 44% in Gabon, 44% also in CAR, 34% in Cameroon, and 12% in DRC (based on de Wasseige 2012). The recent economic crisis and the difficulties to sell timber pushed out some of the long-time logging companies who practiced low impact logging - often under certification schemes. Free concessions are now being allocated to logging companies new in the region, with some changes in the managerial style, or are converted to agricultural lands.

2000s Rush for farmland

Altogether, Congo Basin countries represent about 40 percent of the non-cultivated, non-protected low-population-density land suitable for cultivation in Sub-Saharan Africa and 12 percent of the land available worldwide; if only non-forested suitable areas are included, the Congo Basin still represents about 20 percent of the land available for agricultural expansion in Sub-Saharan Africa and 9 percent worldwide (Deininger et al. 2011). Up to recent times, poor governance, high political risks and lack of infrastructure have limited investments in large-scale land acquisitions in the region. The lack of infrastructure has also participated in the preservation of forests (Megevand et al. 2013). With no possibility to transport and sell their products in urban centers and no access to inputs and materials, farmers focused on family needs. As a consequence, farming practices have poorly evolved, and huge possibilities of technical progress exist to get to better labor conditions, increased yields and more sustainable practices. As a result, urban markets fed on imported food, which in turn doesn't support the domestic production. (Megevand et al. 2013).

	Total (ha)	Under negotiation (ha)	Acquired (ha)
Cameroon	366 117	50 000	316 117
Congo	774 294	110 000	664 294
DRC	163 794		163 794
Gabon	418 400	172 000	246 400
CAR	16 337		16 337
Total	**1 738 942**	**332 000**	**1 406 942**

Table 1: Total surface of agro-industrial concessions acquired or under negotiation in five countries of Central Africa

In recent years, several programs of infrastructure development have been launched. National roads now allow to cross Congo from North to South and West to East; Gabon has also improved its main road axis. Several huge hydro-power dams have entered into production and small cities in rural areas have now access to domestic and public electricity. These development programs have only been possible thanks to a certain political stability in the region since the beginning of the new century. These improvements combined with a lack of non-forested, non-cultivated and non-protected land suitable for agriculture in other regions, have resulted in a new interest of investors to Central Africa.

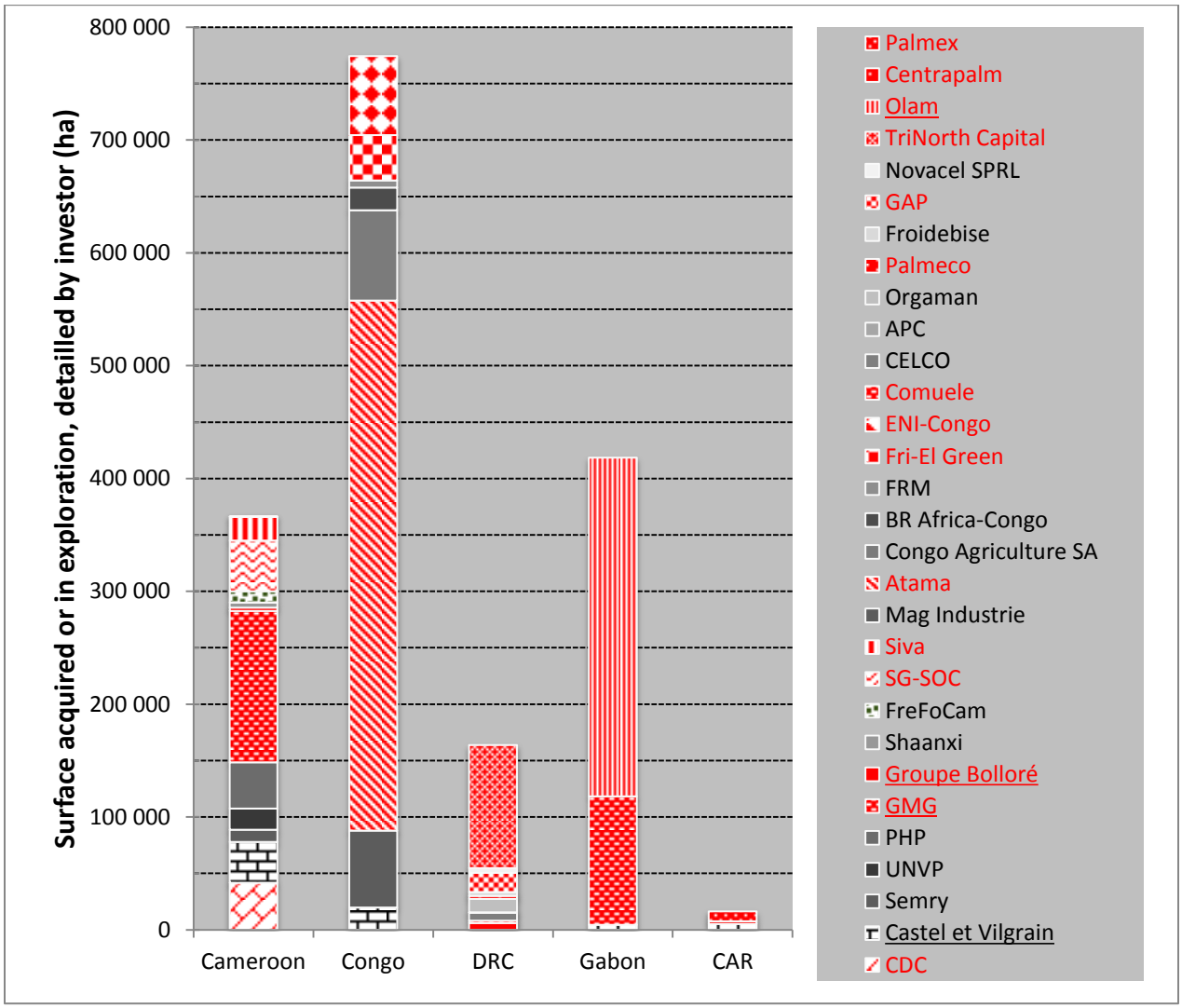

Figure 2: Agro-industrial concessions in five countries of Central Africa, acquired or under negotiation. In the legend, red differentiates oil palm plantations from other crops, and investors present at least in two countries of the region are underlined.

At the beginning of 2013, more than 1.4 M ha has been acquired for agricultural productions or plantations (table 1), more than 300 000 ha are under negotiation between states and investors. In the case of Gabon, an agreement on the surface to be allocated to Olam in addition to the concessions already acquired by the enterprise to develop oil palm and rubber plantations has been signed, discussions are

now on the specific location of these extensions. Negotiations for large-scale land acquisitions are quite secrete. Few official information is published before an agreement is signed between a government and an enterprise, thus the figures shown in table 1 are probably under-estimated.

Four international holdings have activities in at least two countries of the region (figure 2): Group Bolloré (Cameroon, DRC), Group Castel et Vilgrain (Congo, Gabon, Cameroon), GMG (Cameroon, Gabon) and Olam (Gabon, Congo). If Castel et Vilgrain specialized in sugar cane production, the other companies produce natural rubber and palm oil, with in addition commercialization of other agricultural commodities and timber production for Olam. Oil palm is the most extended commodity (figure 2), with the largest concessions acquired totalizing more than 870 000 ha (Atama in Congo, Olam in Gabon, SG-SOC in Cameroon, TriNorth Capital in DRC) and the biggest plans of expansion totalizing more than 260 000 ha (FriEl Green and ENI-Congo are negotiating in Congo, GMG is negotiating in Cameroon and Gabon, Olam will expand in Gabon, Siva and SG-SOC are negotiating in Cameroon).

This rapid expansion of oil palm plantations answers to the domestic demand (all the countries of the region are net importers of palm oil), the global demand for edible oil (human and animal), industrial use and biofuel. The region is also targeted as a suitable place for oil palm, which is natural to the region, with huge areas of non-cultivated, non-protected and low-population-density land. However, potential yields are lower than in Southeast Asia because of the rain regime (with a dry season) and lack of sunlight during the rainy season. But land is getting scarce in Southeast Asia, and industrial producers are looking for new regions to invest in. Africa is an interesting market, and close by Europ, but Latin America might be more interesting in term of yield potential. Besides, certified companies will not develop plantations on forested lands, and might not be willing to invest in savannahs with higher uncertainty on the level of production. For this reason, and because of the difficulties encountered in its plantation in Liberia, Sime Darby has decided to cancel its plan of oil palm plantation in Cameroon (600 000 ha of oil palm plantations were at stake). Sime Darby is one of the funding members of RSPO, and much involved in the promotion of a sustainable palm oil production, thus it was considered impossible to them to develop a plantation on forested lands, and no large-scale (above 300 000 ha) non-forested land suitable for oil palm was available. Certification might thus slow down and limit the surfaces to be converted to oil palm plantations in the future in the region.

Another new trend is the development of Carbon sink plantations. The first project in the region is the Ibi-Batéké plantation of Acacia and Eucalyptus (about 4000 ha) in DRC (near Mampu). This plantation is owned and managed by a Congolese-Belgium private investor, who inherited the customary chief rights over land. However, customary chief of land are supposed to manage the common territory to the benefit of the people. In this plantation project, the chief used the common land to develop a private project. The project is said to benefit to the people thanks to job creation, and building of a few public infrastructures. Nonetheless, people have lost their access to the land where they used to cultivate cassava, and now need to go elsewhere, fortunately, there is a lot of free savannah around, but farer to the villages.

Within the framework of the national program of afforestation and reforestation (ProNAR), a French enterprise invested in a eucalyptus plantation of about 6000 ha in Congo, also under a Carbon sink target. Other similar projects are discussed in the region, however the scale of such projects is ten to a hundred times smaller than oil palm or rubber plantations.

IMPACTS OF LARGE SCALE LAND INVESTMENTS

National procedures have been developed by governments to limit risks of land grabbing and negative impacts on the environment and the population impacted by large-scale land acquisitions. These usually involve Environmental and Social impact assessments (ESIA) conducted either by independent consultants or by public officers (or the two together), followed by operational plans of impact management, signature of Free Prior and Informed Consent (FPIC) with writing of the enterprise commitments in specification books signed by all the parties. These agreements and documents are part of the requirements of certification procedures, and have become national standards. Thanks to this, even not-certified industries have to respect some minimum requirements to ensure certain sustainability in the use of large-scale land acquisitions.

As an example, the Atama society, installed since 2012 in the North of Congo, is not certified, but the society respected the legal procedure and it took 2 years of assessments and discussions between the signature of the agreement protocol with the Ministry of Agriculture and the decree of authorization of occupation of a public land reserve for 25 years (renewable). During these two years, ESIA were conducted, FLIP were negotiated and signed (in November 2012, some villages were still negotiating with the enterprise and the preparation of the land for plantation around these villages was postponed until signature). The main difference between this plantation and a RSPO certified one thus lies in the impact on forest. Indeed, Olam in Gabon, RSPO member, refused land in High Conservation Value (HCV) forests, inundated forest or Ramsar sites, and Sime Darby, RSPO certified, cancelled its plans of oil palm plantation in Cameroon because only forested land were available for large-scale plantations. On the opposite, Atama is not a RSPO member, and thus accepted a concession in a forest area, part of the concession being a declassified forest (from the UFE Ngombe), and part being on inundated forest, and even argued to the government officers that savannahs were not suitable for oil palm plantations, without further enquiry in the actual production potential. Because Olam-Gabon followed the RSPO recommendation to define the area to be planted, including FPIC, HCV assessment, buffer zones around rivers and inundated areas, 70% of the land attributed by the State to the group was stepped aside and will not be planted. Part of it has been excluded from the Olam concessions (especially areas on Ramsar sites or where villages refused the project), and part will remain under the management of Olam but not be planted (HCV areas, buffer zones).

Large-scale land based projects create new living areas, with locally an increase in the human population which induce increasing pressure on natural resources and new demand for food crops and bush meat. In some cases (e.g. in DRC) the government has mandated the development of large farms to mitigate local food shortages arising from the nutritional demands associated with projects such as large-scale mining concessions which attract large numbers of peoples. The Atama oil palm plantation in northern Congo or Olam plantations in Gabon are good illustrations of the need for planning of the consequences of a local increase in the population. Atama plans to employ more than 27 000 people on the plantation, once the whole 180 000 ha are planted. The enterprise will build and organize life camp bases every 36 000 ha of plantation. These life camps are planned to soon turn into villages, including an administration building, schools, health care centre, food and other stores, churches or other religious buildings. Lack of local labour force induces needs for immigration of workers, which will create local pools of ethnic diversity in places of previously low population density (less than 2 hab/km2 before the project, 18 hab/km2 at a minimum after the plantation is completed). Local customary land owners might not accept to give away

land for food crops to these new comers, this fact needs to be discussed during the FPIC process, to make sure the long term consequences of such a plantation project are well understood by the local people. This pool of people will create a high local demand for cassava and bush meat, among other food products, and also for fuel wood and timber for housing. Adjacent forests might suffer from a higher pressure of hunting, gathering and slash and burn for cultivation purposes. Thus impact management plans must be seriously though, implemented and controlled to avoid a big loss of natural resources.

A good planning of such large scale projects, following clear procedures, will limit negative outcomes and enhance positive results for local livelihoods and national economies. FPIC, if conducted scrupulously with full information provided to the affected population and actual negotiations on the engagements of the enterprise, might be a guarantee against land grab, and might enhance good partnership and economic benefits for all the stakeholders. Transparency of deals and negotiations are keys to success. Where FPIC and ESIA are not conducted in a transparent way, or not done at all, social conflicts might rise in answer to a feeling of unfair contracts, or land grabbing, or a complete refusal of the project by the local people. This is the case in South-West Cameroon, where the American enterprise SG-SOC has a project of oil palm plantation, the Herakles Farms. The enterprise signed a convention in 2009 with the Minister of Economy Planning and Regional Development (Louis Paul Motaze) to develop an oil palm plantation. But this convention has not been accompanied by a transparent discussion with the other public institutions involved (for example the Forest and Agriculture Ministries), or with the villages impacted by the project. The lack of transparency raised a lot of complaints from local villagers, national and international NGOs. It is still unclear at the beginning of 2013, what is the operational plan of SG-SOC, how much land will be planted in oil palm, what will be the compensations and benefits for the local population, and what is the State's position regarding the project.

In addition to livelihoods and environmental impacts, large-scale land investments also influence political reforms, institutional and legislative changes, necessary to adapt and better manage these projects. National land use plans are reframed in Congo and Cameroon, land tenure reforms come back to the political agenda (DRC), inter-sectorial institutions are created to moderate discussions between ministries about large-scale land allocation (Cameroon, Congo), involving ministries of agriculture, forest, environment, extractive mining, development and others. These reforms are necessary, but they need time to be well-thought and implemented. The present demand from investors leads governments to engage in reforms under pressure, and with guidance from the investors rather than from neutral experts. In the absence of clear steps to follow, or to avoid waiting One or two years before getting a plantation permit, investors might be tempted to negotiate directly with Presidents or Prime Ministers. Under presidential regimes this shortcut isn't surprising. However, such behaviours don't encourage democratic and transparent decision-making. What is the responsibility of big economic actors in promoting transparent and democratic governance? Is social and environmental responsibility the only responsibility of big enterprises?

CONCLUSION

The years 2000s have seen a renewed interest of investors in Central African lands. This wave of large-scale land acquisitions is the fourth of its kind in the region, after colonial, post-colonial and readjustment ones. Oil palm is the production that fosters the largest surfaces, before rubber. Carbon sink plantations represent a new type of investment.

This trend is both a great opportunity for the host countries to develop their agricultural sectors and diversify their economies, and a threat for natural forests and eventually for local people access to land. In order to turn threats into opportunities, an inter-sectorial policy approach is needed, to develop integrated land use plans at national and regional scales, taking into account the interest of the various stakeholders, their individual or institutional power resources and consistently seeking sustainability. Several countries of the region are engaged in reforms and create new institutions to better manage large-scale land investments.

Some standards have been integrated into the legal procedures to get permits of plantation, including FPIC and ESIA. The generalization of ESIA and FPIC is a good step toward better sustainability and a safety net against land grabbing. However, texts are not enough, and a proper implementation of these assessments and negotiations are needed. Besides, there is still a lot to do to get transparent land deals.

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